

# GETTING STARTED WITH IQ CHART

## A Guide for Using IQ Chart Version 6

Here's how to use the IQ Chart 6 Getting Started Guide.

- Section I: 6 Tips Every IQ Chart User Should Know
- Sections II-III: Sign-up and download information
- Sections IV-XI: Basic features and functionality

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## ***I. 6 Tips Every IQ Chart User Should Know***

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Welcome to the IQ Chart 6 Getting Started Guide! To celebrate the sixth version of IQ Chart, we've started out this user guide with 6 tips that every IQ Chart user, new and old, should know about. This section includes tips and features that utilize some of the most powerful (and often unknown) features of the software.

If you're looking for information on how to become an IQ Chart subscriber or how to download the software, please head to Section II on Page 8.

Sections IV-XII cover basic features and functionality, and starts on Page 9.

For detailed information on all of our technical indicators and overlays, please go to the "Stock Charts 101" section of our web site at <http://www.iqchart.com/101>

**Tip #1: Learn your "Hot Keys"**

**Tip #2: All Charts are now Streaming, No Need to Hit the "Refresh" button.**

**Tip #3: When in doubt, "Right-Click" your mouse.**

**Tip #4: Change the Layout to add or remove charts from the main screen.**

**Tip #5: Use Groups to change more than one chart at once**

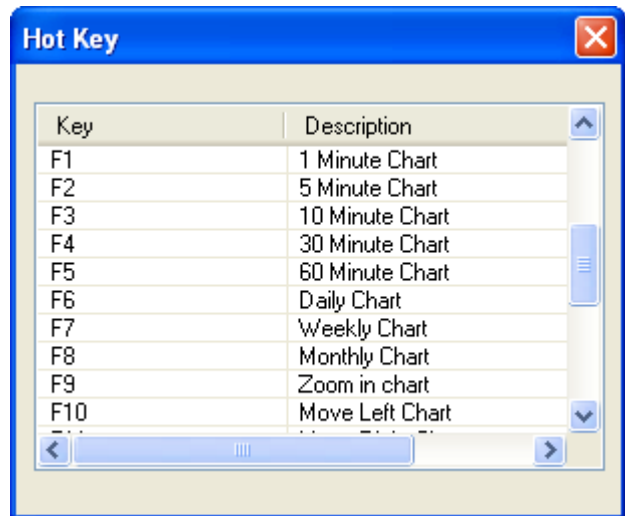
**Tip #6: Use preferences liberally to have the charts look exactly as you would like them.**

**Tip #1: Learn your “Hot Keys”**

You can use your keyboard for most activities in IQ Chart. For instance, click the “F2” key, and the time frame in your current chart window will change to a 5-minute chart.

Your mouse wheel can be used to zoom in and out of charts.

There are also keyboard short cuts for a slide show, new portfolio windows and much more. To open the hot key window and see the complete list go to “Help” → “Hot Key” in IQ Chart.

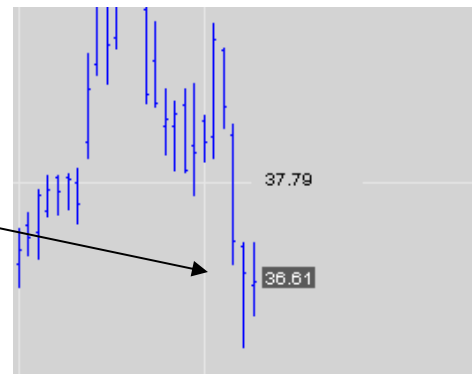


**Tip #2: All Charts are now Streaming, No Need to Hit the “Refresh” button.**

All charts display the current, real-time price in an off-color box to the right of the rightmost bar or candle in your daily and intraday charts.

There is no need to hit the Refresh button.

In multi-chart layouts, all charts will stream in real-time.



**Tip #3: When in doubt, “Right-Click” your mouse.**

Whenever you’re using IQ Chart, the most commonly used features are available by right-clicking your mouse, which many users find much easier than navigating by menu.

In the main chart area, you can add a symbol to your favorites list, switch time frames, change preferences, etc.

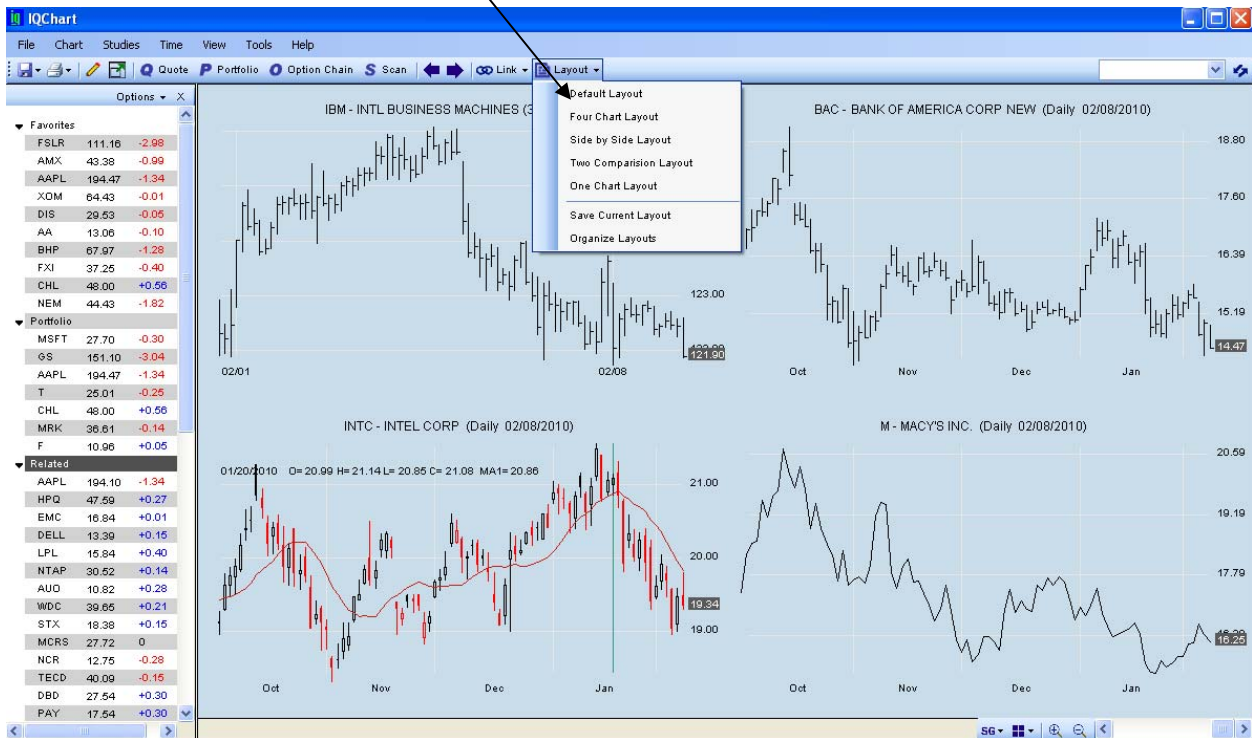
Right-click on the favorites column to add a symbol, open a quote, chart or option chain window, copy or delete an entry or organize the favorites column. Right-click can be used on almost any window or area within IQ Chart, so use it liberally to get the most out of the software.



**Tip #4: Change the Layout to add or remove charts from the main screen.**

In IQ Chart, you can view up to four charts on a single screen. Each chart can have different symbols, time frames, configurations, and so on, allowing you to keep track of multiple symbols without having to reload them manually.

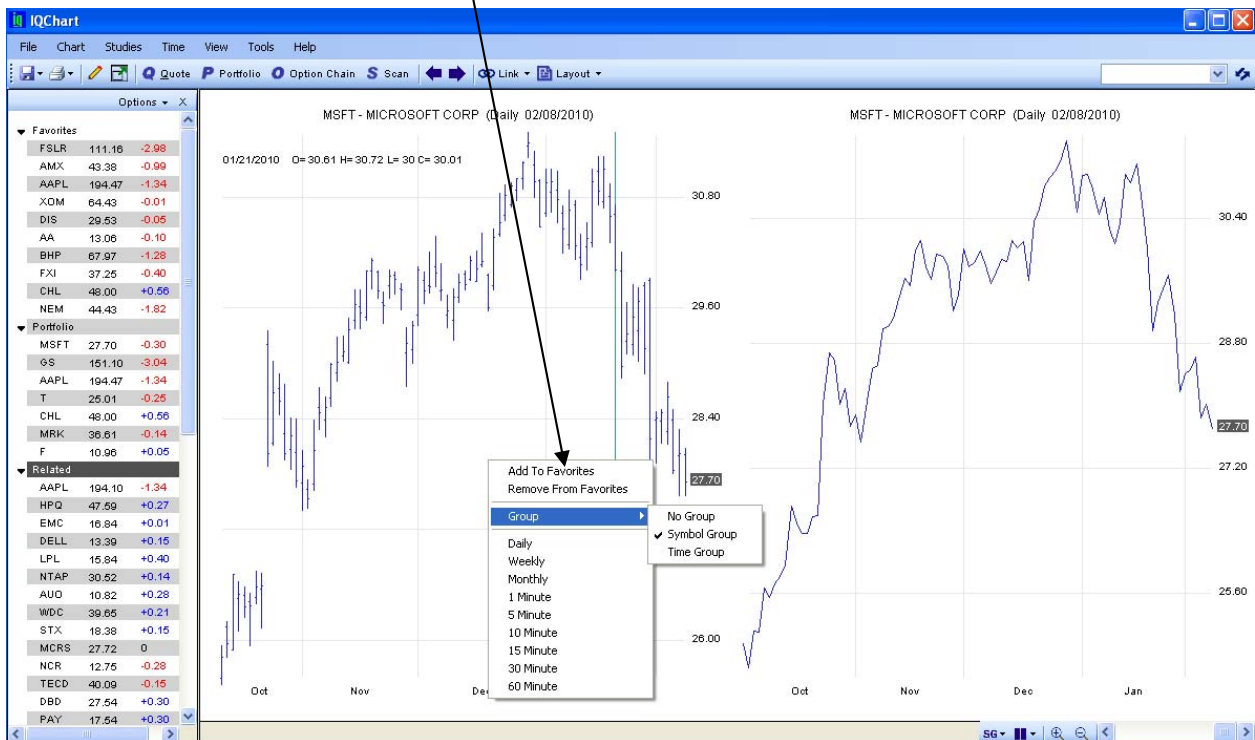
There are five different layouts, and they can be changed by clicking on the layout button shown across the top of the software.



**Tip #5: Use Groups to change more than one chart at once**

When you are displaying more than one chart, by default you are only changing the symbol, time frame or configuration of one chart at a time.

What if you want to change all of the charts displayed from a daily chart to a 5-minute chart? Using the “group” function in IQ Chart allows you to do just that. Right-click on the main chart window and select “Group” and then “Symbol Group” and whenever you change the symbol all charts will be updated. “Time Group” allows you to change the time frame of all charts at once. “No Group” turns this feature off.



**Tip #6: The single chart layout can be used to have multiple workspaces.**

Even when you have selected the single chart layout, there are multiple tabs at the bottom which can be used to save favorite charts and views. There is a “new tab” icon at the bottom right that allows you to add tabs.



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## ***II. Registration – Becoming an IQ Chart Subscriber***

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Before you can begin using IQ Chart, you must register to be a subscriber.

To register, please go to <http://www.iqchart.com/iqchart/registration>

**Complimentary trial periods are available to all new customers.**

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## ***III. Downloading IQ Chart***

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IQ Chart is a software application. This means that you must download IQ Chart from our Web site and install it on your computer in order to use the software.

Please download IQ Chart at <http://www.iqchart.com/download/> and save the application.

IQ Chart is currently available for the following operating systems.

- Windows 95, 98, NT, 2000, ME, XP, Windows 7.

Once download is complete, double click on the application. The installation process will begin, and an IQ Chart icon will be found on the desktop of your computer.

The IQ Chart icon is called “IQ Chart 6”. Double click on the icon to open the software! You’ll be asked to enter the username and password you supplied when registering. If you have not yet registered, see Section II.

## IV. IQ Chart Menu and Navigation

The IQ Chart menu and navigation system is both powerful and easy-to-use. As shown on the snapshot below, it is found at the top of IQ Chart.

Here is a guide to the main features and functions of the menu system.

### Top-Level Menu Items

File	Open new windows, printing, export data and close the program.
Chart	Chart properties such as scale, color and font.
Studies	Add or remove chart overlays and technical indicators.
View	Open or close the favorites column and toolbox.
Tools	For preferences and organizing favorites lists.
Help	Quick links to education portions of <a href="http://www.iqchart.com/">http://www.iqchart.com/</a>



### Top Level Icons

Save Icon	Save data or images.
Print Icon	Print and print preview.
Crayon Icon	Open a drawing tools window.
Full Screen Icon	Show IQ Chart as full screen without navigation.
Quote	Open a quote window.
Portfolio	Open a portfolio window.
Option Chain	Open an option chain window.
Scan	Open a window for new scans.
Left/Right Arrows	Go back and forward through symbols already entered.
Link	External links to third-party finance sites.
Layout	Change the number of charts shown.



### Bottom-Level Navigation

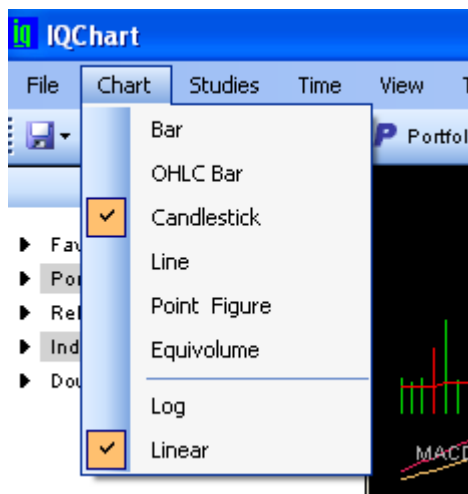
Tabs	In single-chart layout only. Displays multiple charts.
New Tab Icon	Creates a new tab.
Layout Icon	Changes the default layout, similar to Layout tab in main nav.
Magnifying Glass	Zoom in and out.
Scroll Bar	Go backwards and forwards in time for the chart displayed.
NG	(Multi-chart layout only). Change Group setting (see page 6.)

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## V. Chart Properties

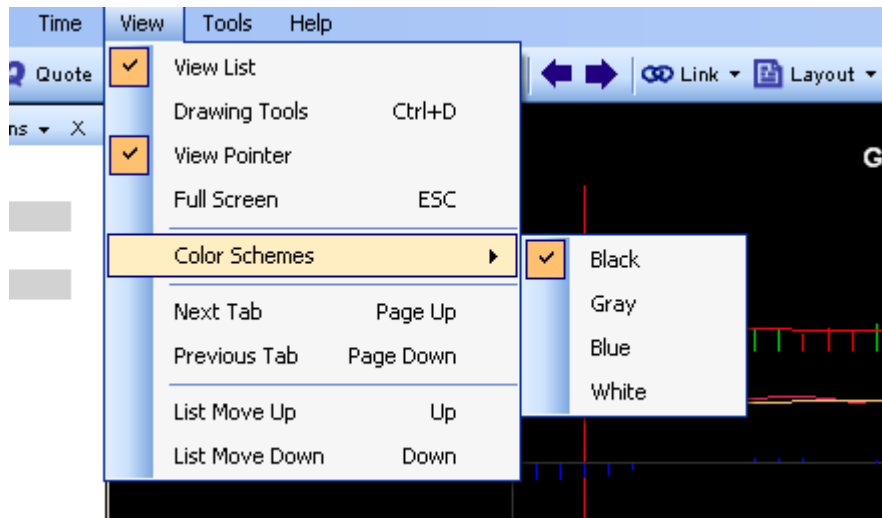
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IQ Chart allows you to customize the chart window in many different ways. To alter a chart's properties, simply click on the "Chart" menu of the top-level navigation as seen below.

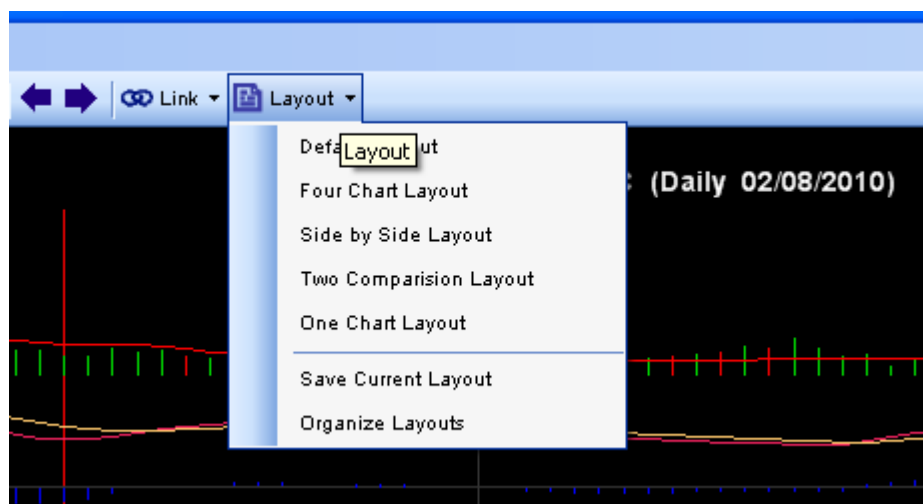


Current properties are marked with a check mark. The chart setting shown above is for a Candlestick chart, and the scale is linear. To change these properties simply select them with your mouse and the chart window will change.

To change the color scheme, select “View” and then “Color Schemes” and then select a color. The “View” menu can also be used to open and close the drawing tools menu and turn on or off the pointer.



Clicking on the “Layout” button allows you to select multiple ways to view charts



## VI. Overlays and Technical Indicators

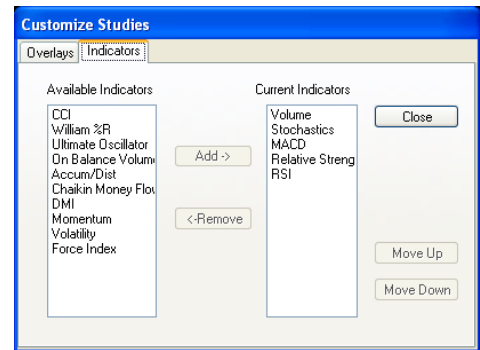
IQ Chart has many technical analysis tools to help traders and investors make intelligent and informed decisions on their investment.

The **Studies** menu contains overlays that are superimposed upon the chart such as “Moving Averages” and studies that are found above the chart such as “Volume” and “MACD”. Simply select an indicator to add it to the chart or select an existing indicator to remove it.

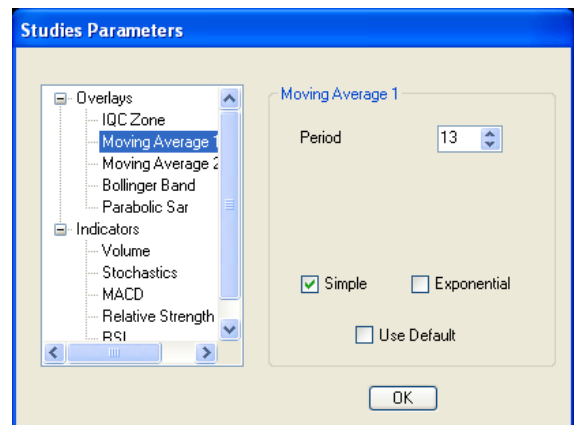


There are several advanced features that work with Overlays and Indicators.

At the bottom of the Studies menu, you can **customize** the menu. This allows you to add or remove indicators from the menu for easier selection and organization.



By clicking **Parameters** at the bottom of the Studies menu, you can change the settings of a particular indicator or overlay. In this example, the period of the Moving Average 1 is being adjusted.



## VII. Favorites – Setting Up Your Quote Watchlists

The IQ Chart Favorites Column is a customizable, real-time watchlist to help you keep track of stock prices throughout the trading day.

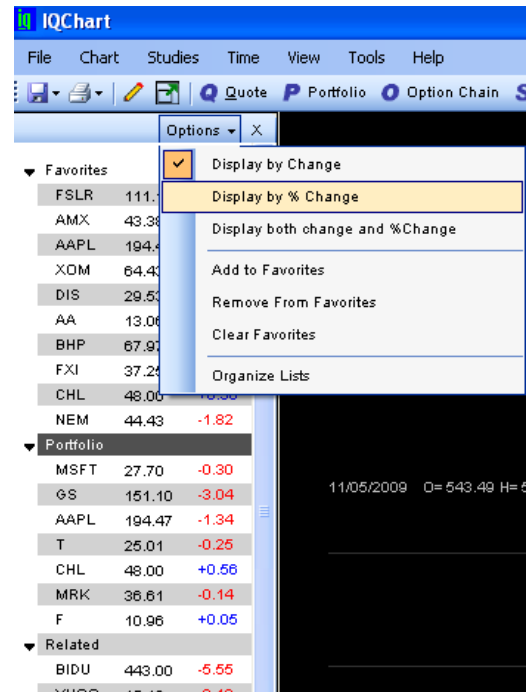
The options menu on the Favorites Column provides several options, including adding a symbol (or more than one symbol) and changing the data displayed.

To delete a symbol, simply select it with your mouse; then hit the delete button on your keyboard. Or right-click your mouse on the symbol and select that option.

The Organize menu option has several features, including

- Adding pre-defined lists of symbols
- Executing real-time scans such as top gainers and losers
- Selecting from a group of pre-defined sector lists.
- Showing groups of stocks from a scan result.

To hide the favorites column, click on the “X” in the upper-right hand column of the column.

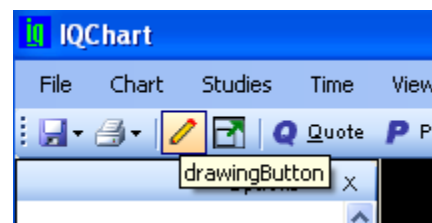


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## VIII. Toolbox – Drawing and Pointing Devices

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The IQ Chart Toolbox is found by clicking on the crayon button in the upper-right hand corner of the software.



This will open a window for drawing and pointing functions.

**Pointer:** is represented by an arrow. The pointer isolates a specific period of time with a vertical line. The price and technical information for that period will be displayed at the bottom of the chart window.

**Cross:** The cross utilizes a vertical and horizontal line to form a crosshair. The period isolated by the vertical line will be displayed on the bottom of the chart window along with the price or technical information targeted by the horizontal line.



**Trendline:** This icon is a diagonal line, and it allows you to draw a trendline on the chart.

**Fibonacci Retracement:** This icon is represented by a Z with a horizontal line through the center. When used, this will create a set of five horizontal lines connected by a diagonal line.

**Horizontal Line:** Using this feature forms a horizontal line across the entirety of the chart window.

**Square:** This symbol allows you to draw a rectangle on the chart.

**Area/Notes:** This icon is represented by an A. It highlights an area of the chart, and allows you to enter a text note about the chart.

**X:** This is to delete a highlighted selection.

Move a drawing by clicking and dragging with your mouse.

Delete using the delete key or the “Trash” icon.

## IX. Tracker – IQ Chart’s Portfolio Manager

IQ Chart’s portfolio tool is called “Portfolio”, and can be opened by clicking on the “Portfolio” button in the top-level navigation.



Symbol	Name	Last	Net	Net %	Volume	Open	High	Low	Shares	Basis	Today P/L	P/L	Value
CHL	CHINA MOBILE LTD	47.95	0.57	1.20	1,844,860	48.41	48.61	47.91					
MRK	MERCK & COMPANY INCORPO...	36.59	-0.14	-0.38	10,215,770	36.58	37.08	36.22					
GS	GOLDMAN SACHS GROUP INC...	151.14	-3.05	-2.02	10,258,954	154.27	154.60	150.82					
AAPL	APPLE INCORPORATED	194.10	-1.34	-0.69	17,040,028	195.69	197.88	194.00					
T	AT & T INC	24.97	-0.25	-1.04	27,175,582	25.19	25.27	24.95					
MSFT	MICROSOFT CORPORATION	27.71	-0.30	-1.08	52,824,871	28.01	28.07	27.56					
F	FORD MOTOR COMPANY	11.01	0.05	0.54	92,001,168	11.09	11.31	10.88					

The portfolio window operates like a spreadsheet, to add a symbol simply click on the bottom left-hand symbol and type it in.

When entering symbols, you also have the option of entering a position (number of shares) and the basis (price you purchased it at). To track short sales, enter a negative position. For example, if you are short 200 shares, enter -200.

Columns may be added or removed from the portfolio manager by right-clicking on the window and unchecking or checking the available menu items.

## X. Stock Scan – Screening the Markets for Trading Opportunities

IQ Chart's scan function is designed to help an investor find the type of stock he or she is looking for. With over 200 variables to choose from, you can develop your own customized stock screen using price-, volume-, technical-, fundamental- and candlestick- based criteria. The scan function is located at the "Scan" button across the top of IQ Chart.

There are a number of pre-defined scan templates. Select one and click “Scan” to run the scan and see the listings returned.

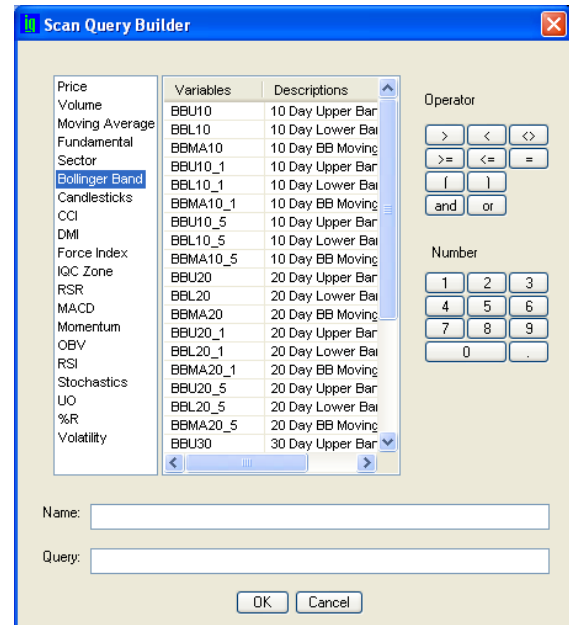
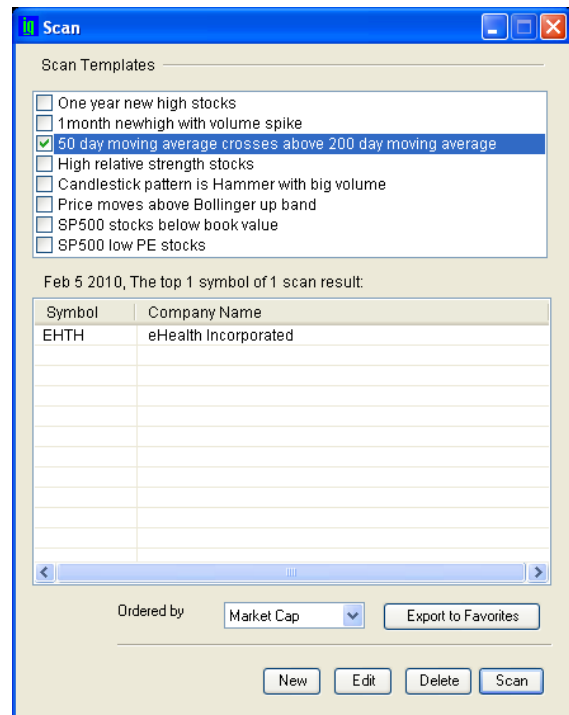
Scan results can be ordered by Market Cap, Volume and other criteria using the drop-down menu at the bottom of the window. The lists may be exported as favorites.

Clicking on the “New” button in the scan window allows you to create your own templates.

Select a parameter (in the window to the right, Bollinger Band is selected) to see the variables allowed. Create a scan formula using operators and variables and click “OK” to save.

For example, a scan query looking for a closing price above the upper Bollinger Band might look as follows.

`CLOSE > BBU10`



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## ***XI. Further Questions?***

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If you have further questions about using IQ Chart, our customer service team is happy to help. Please send e-mail to [support@iqchart.com](mailto:support@iqchart.com)